

VITA Grant Recipient Required Actions and Other Information

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Required Actions

In order to properly establish your grant account, the Grant Program Office requires your organization to take the following actions. Return the completed forms, revised program plan and budget revisions within **20 calendar days from the date of grant notification**.

Please retain a copy of all documents for your records. The preferred method for communicating with the Grant Program Office is via e-mail. The e-mail address of your assigned grant officer is provided in the letter announcing the award. However, if a document requires original signatures, it must be sent to the following address: **IRS, Grant Program Office, 401 West Peachtree Street, NW, Stop 420-D, Atlanta, Georgia 30308**.

Failure to return the requested information by the due date or receive an **approved** exception **will result** in non-consideration for future grant opportunities.

Any questions should be directed to your assigned grant officer.

Item	Actions	Method	Due
1	Form 13981, Grant Agreement Review the Form 13981, <i>Grant Agreement</i> , with Terms and Conditions and Grant Reporting Requirements. Confirm the number of projected returns. Any change to projected returns must be approved by the Chief, Grant Program Office prior to grant acceptance. Sign the Form 13981.	E-mail to your assigned grant officer	20 calendar days from date of grant notification
2	Form 13533, Sponsor Agreement Review Publication 4299, <i>Privacy and Confidentiality - A Public Trust</i> . You must become familiar with the safety and security requirements contained in this publication. Complete and sign Form 13533, Sponsor Agreement.	E-mail to your assigned grant officer	20 calendar days from date of grant notification
3	Program Plan/Workbook Revisions Review and revise your <i>Program Plan Narrative</i> and <i>VITA Grant Workbook</i> if significant changes are required due to the reduction in funds. Please <u>do not rewrite</u> your narrative or workbook but provide a summary list of the changes.	E-mail to your assigned grant officer	20 calendar days from date of grant notification
4	Budget Revisions Review and revise your <i>Standard Form 424A</i> and the <i>Budget Detail Explanation</i> . The Federal Funds column must reflect any adjustment due to the award amount received.	E-mail to your assigned grant officer	20 calendar days from date of grant notification

Item	Actions	Method	Due
5	Matching Funds Submit any matching funds supporting documentation not previously provided. Note: Additional funds will be made available once documentation is provided showing the remaining matching funds are available.	E-mail to your assigned grant officer	No later than January 31
6	Standard Form 1199A, Direct Deposit Sign-up Form Complete recipient portion of the Standard Form 1199A, <i>Direct Deposit Sign-up Form</i> , and have your financial establishment complete their portion. This form will be reviewed by IRS and then forwarded to the Division of Payment Management (DPM) for account establishment. Due to the problems experienced in completing this form correctly, line-by-line instructions are enclosed to reduce the chance the form cannot be processed by DPM. If you are a previous VITA Grant recipient, you are only required to submit a SF 1199A if information has changed since your previous submission.	Original signatures ONLY!!! Mail to your assigned grant officer at the address provided above	20 calendar days from date of grant notification
7	Payment Management System Access Form Complete the Payment Management System Access Form for the Division of Payment Management.	E-mail to your assigned grant officer	20 calendar days from date of grant notification
8	Primary Contact Form Complete the primary contact form for your organization for the GPO. This document also includes contact information for the GPO grant officer assigned to your account.	E-mail to your assigned grant officer	20 calendar days from date of grant notification
9	Site Information Provide a listing of sites established for this program period. Please use the VITA Target Audience worksheet found in the VITA Grant Workbook provided on the VITA Grant webpage. Be sure to include site location, SIDN and EFIN. If no changes are required to the list submitted with the application, an e-mail notifying the grant officer that this is the case is sufficient.	E-mail to your assigned grant officer	January 31

Other Information

Grant Program Office (GPO) Evaluation Feedback

Concerns or questions identified during the GPO Evaluation are included with this package. These concerns may be with your proposed budget, matching funds summary chart, or matching funds documentation.

Technical Evaluation Feedback

Feedback from the technical ranking is included with this package unless you were a prior multi-year grant recipient (technical ranking was not required).

VITA Grant Webinar and Conference Calls

Orientation for the VITA Grant program is announced on the VITA Grant webpage:
www.irs.gov/individuals/article/0,,id=184243,00.html

Please review the posted information and make plans to be available for the sessions that apply to your organization.

Payment Management System (PMS) Account Establishment

The IRS will authorize Division of Payment Management (DPM) to release grant funds after all required documents and forms are received, approved and processed. It normally takes 2-3 weeks for DPM to establish your account. The primary contact person will receive an e-mail from DPM providing the electronic login and password to access and withdraw funds using the PMS at www.dpm.psc.gov. It is our intent to have all documented funds available by December 31. The receipt and processing of all required forms and DPM's workload will dictate whether this is achievable. We will notify your organization when the account is established.

Completion of DPM Contact Information Form and Standard Form 1199A, Direct Deposit Sign-Up Form - Grant recipients must have an active account in the PMS in order to request funds. The accounts are established in PMS once the completed SF 1199A and PMS Access Form are received by the Division of Payment Management (DPM).

The GPO is responsible for requesting and reviewing all SF1199A and PMS Access Forms before forwarding to DPM for processing. Return both documents to your assigned grant officer. The SF 1199A must be mailed to the attention of your grant officer at:

**IRS Grant Program Office
401 West Peachtree Street, NW, Stop 420-D
Atlanta, Georgia 30308**

The PMS Access Form must be e-mailed to your grant officer. Additional instructions for completion of the SF 1199A and PMS Access Form follow.

Completion of DPM Payment Management System Access Form

If applicable complete the DPM Payment Management System Access Form. Detailed instructions follow for completion of the document.

Instructions for the DPM PMS Access Form	
Action Requested	<ul style="list-style-type: none"> New VITA Grant recipients select “Establish New User Access” Note: <i>Those organizations that received a VITA Grant in <u>2009 Only</u>, should also select “Establish New User Access”.</i> 2010 and/or 2011 VITA Grant recipients need to complete the form only if you are changing, updating or deactivating existing user access. Select the appropriate box.
1. Name of Institution/Organization	This should reflect the legal name recorded on the Standard Form 424, Application for Federal Assistance, block 8a.
2. Payee Identification Number (PIN)	Leave blank unless you were a 2009 or 2010 VITA Grant recipient. If a 2009 or 2010 VITA Grant recipient, record the PIN assigned to your VITA Grant PMS account, i.e. C####. The PIN is five digits—four numbers and one alpha character.
3. Request to Establish/Change Access or Update Contact Info	This should be the person responsible for requesting funds within PMS.
Name	Self-explanatory
Telephone Number	Self-explanatory
E-Mail Address	Self-explanatory – Please pay particular attention to the accuracy of this information. The password information will be communicated via e-mail.
Mailing Address	Self-explanatory – no P.O. Box addresses allowed
*4. Type of access requested	Self-explanatory
5. Supervisor’s Approval	This should be the person within the organization that directs and approves the work completed by the primary contact and/or the alternate contact.
Supervisor Name	Self-explanatory
Supervisor’s Signature	Self-explanatory
Supervisor’s Title	Self-explanatory
Supervisor’s Telephone Number	Self-explanatory

Return this form to your assigned grant officer.

Note: If multiple individuals will be responsible for quarterly report submission or payment requests, separate forms must be completed and submitted for each individual. See training material on the Division of Payment Management’s website www.dpm.psc.gov for detailed instructions on “Type of access requested.”

Completion of Standard Form 1199A, *Direct Deposit Sign-Up Form*

Please read these instructions and the instructions with the SF 1199A before completing the form in order to avoid re-work. Recipients that are **not** previous VITA Grant recipients **must** complete the SF 1199A.

Note: If you are a previous VITA Grant recipient and your information changed (name, address, account number, financial institution), you must submit a SF 1199A with the revised information.

The following guidance applies to all fields on the SF 1199A. Please ensure you adhere to this guidance to avoid delay in account establishment.

1. All information is to be typed or printed in ink on the SF 1199A.
2. All signatures must be original and in ink. Use blue ink so there is no doubt as to whether a signature is an original signature.
3. Alterations such as erasures, correction fluid or tape, and strike-outs are unacceptable and will invalidate the form.
4. The DUNS (Dun and Bradstreet Number) from the SF 424 block 8c must be typed or printed at the top right-hand corner of the SF 1199A.
5. All data elements on the SF 1199A must be completed unless a blank is indicated.
6. Plan ahead. Complete multiple original documents before you take them to your financial institution in case they make a mistake.
7. The form cannot be faxed.

Instructions for Standard Form 1199A, Direct Deposit Sign-Up Form	
Section 1 (To be completed by payee)	
A. Name of Payee	This is the legal name used on the SF 424.
Address	Self-explanatory
City, State, Zip Code	Self-explanatory
Telephone Number	Self-explanatory
B. Name of Person(s) Entitled to Payment	DO NOT put an individual's name. Input your organization's name (same as A).
C. Claim or Payroll ID Number	Provide your IRS Employer Identification Number (EIN). This must be the same EIN provided on the SF 424 in block 8b.
Payee/Joint Payee Certification	Must be signed by an individual(s) having signature authority for the bank account. Be sure to date.
D. Type of Depositor Account	Select the type of account funds will be deposited in. Most organizations will mark the "checking" block.
E. Depositor Account Number	Record your organization's account number for the type of account selected.
F. Type of Payment	Mark "Other" and specify "Grant"
G. Allotment of Payment	Leave blank – Do not complete any of

Instructions for Standard Form 1199A, Direct Deposit Sign-Up Form	
Section 1 (To be completed by payee)	
	this section which includes the joint account holders' certification.
Section 2 (To be completed by payee)	
Government Agency Name	Internal Revenue Service – Grant Program Office
Government Agency Address	401 W Peachtree St NW, Stop 420-D, Atlanta, GA 30308
Section 3 (To be completed by Financial Institution)	
Name and Address of Financial Institution	Self-explanatory
Routing Number	Self-explanatory
Depositor Account Title	This should be the account name.
Representative's Name	Self-explanatory
Signature of Representative	Self-explanatory
Telephone Number	Self-explanatory
Date	Self-explanatory

Before sending the completed and signed documents, review to ensure all documents are included and that no alterations were made to the SF 1199A. This was one area where recipients experienced delay in account establishment last year. **This form must be sent to: IRS Grant Program Office, 401 West Peachtree Street, NW, Stop 420-D, Atlanta, Georgia 30308**

Additional Resources

You may find the following documents on www.irs.gov.

- Publication 4883, *Grant Programs Resource Guide*
- Publication 4671, *VITA Program Overview and Application Package*
- Publication 1084, *IRS Volunteer Site Coordinator's Handbook*
- Form 13614-C, *Intake/Interview & Quality Review Sheet*
- Publication 4299, *Privacy and Confidentiality – A Public Trust*
- Publication 561, *Determining the Value of Donated Property*